



DocuSign for Atamis

Service Description Document

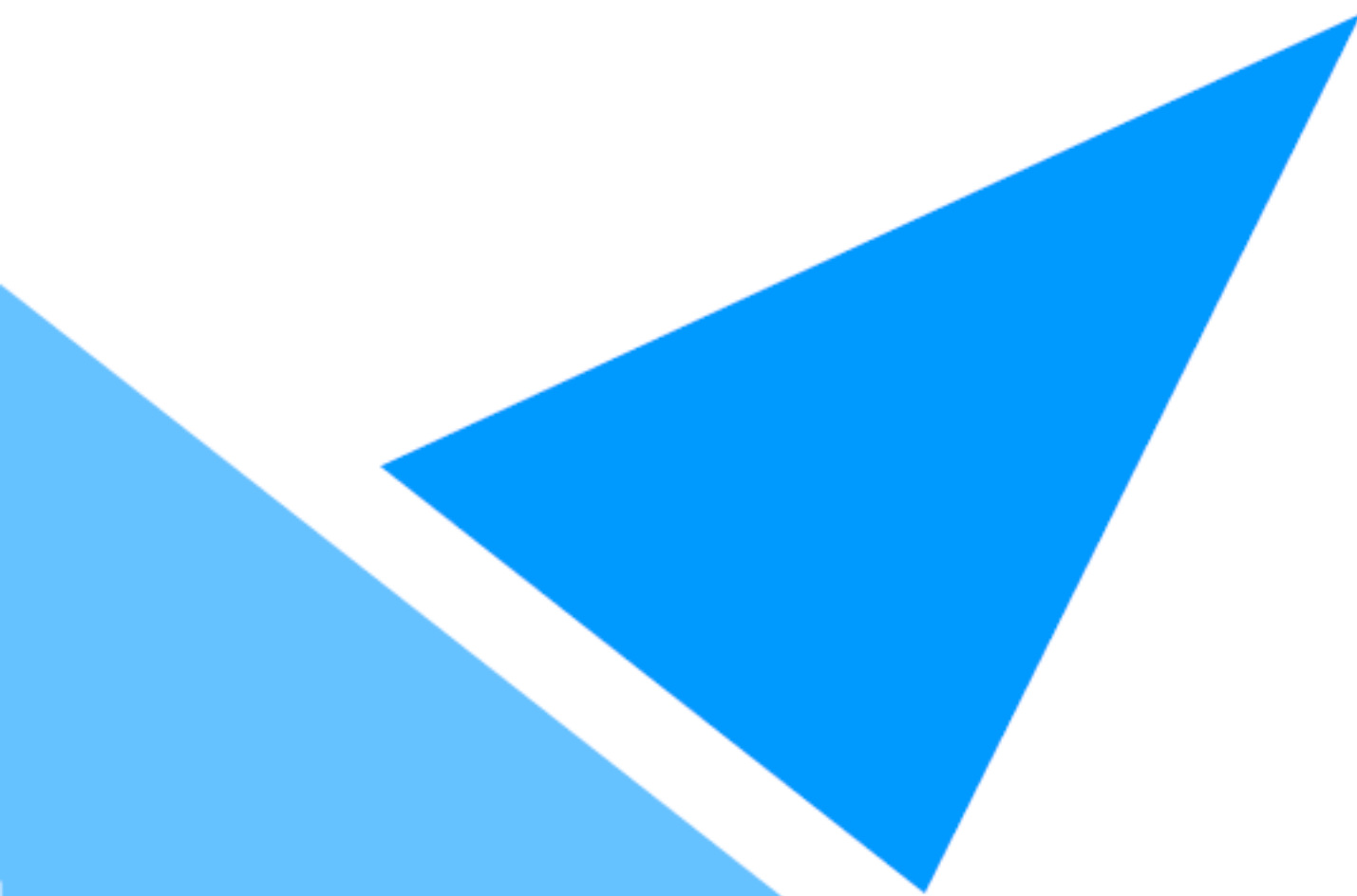


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About Atamis

Who are Atamis?

Atamis is a leading UK procurement solution provider, delivering software that generates value through insights, fosters intelligence through collaboration, and drives efficiency across the entire commercial lifecycle.

Atamis supports over 300 organisations, across both public and private sector, through its versatile software-as-a-service platform. By offering a modular suite of apps and integrations, the solution enables seamless data mobility and can be tailored to meet unique client requirements. Flexibility is evidenced by its diverse applications, providing eSourcing, contract and supplier due diligence for central government, local authorities, housing, utilities, financial services and more, as well as managing the full commercial lifecycle for some of the largest organisations in Europe, including the NHS, via the Department of Health and Social Care's (DHSC) end-to-end eCommerce system, which is deployed across the wider health service and its arm's length bodies.

Atamis' approach allows clients to select from a portfolio of Apps, Enhancers & Integrations to meet their unique needs and supports the democratisation of commercial data for greater visibility and better decision making across the whole organisation. Powered by Salesforce, Atamis boasts sophisticated reporting and dashboarding capabilities, meaning accurate, reliable, responsive and intuitive, information in the system is available to Procurement and Commercial teams, as well as being made available to the wider stakeholder groups.

Clients tell us that no other procurement system is as capable of meeting their nuanced requirements, but what sets Atamis apart above all else is the high level of support you'll get from a dedicated team of responsive, proactive and talented people who take pride in personally ensuring your procurement operation has maximum impact.

What is our vision?

Our vision is to be the leading force in driving procurement excellence by empowering its role as a strategic driver of commercial value, success and sustainability within an organisation. Our mission is to transform and optimise procurement, enhance its strategic value and achieve success by investing in the power of people, process and technology. Together, we will drive efficiency, growth and sustainable commercial value to our clients and the world around us.

Atamis was established in 2009 and quickly grew into a leading procurement software provider. The business' founder had a vision to find a nurturing and

permanent home for Atamis once he felt he had taken its growth as far as he could and decided to transfer ownership of the company over to Banyan Software UK Ltd in October 2021. Banyan Software pride themselves in continuing the legacy of a company's culture, product and teams that have been built over many years. Banyan's support has enabled Atamis to continue its rapid growth trajectory not only in terms of recruitment but also in the strategic development of our product. This support will remain steadfast as the growth journey pushes forward.

How does our vision support your organisation?

At Atamis, we believe in procurement with purpose. We invest in people, process and technology, combining these elements to achieve greater outcomes. This is why clients and colleagues feel that they will never be just a number to us and why nine out of ten Atamis clients renew each year. Atamis' ultimate purpose is to save people time and money through providing responsive procurement solutions. Our greatest satisfaction comes from enabling our clients to maximise value from their procurement activity and elevate their strategic contributions within their organisations, so that procurement functions have the greatest possible impact.

Docusign for Atamis

Introduction

Docusign for Atamis is a powerful integration that bridges the gap between your contract management system and the world's leading electronic signature platform. Instead of treating e-signatures as a separate, disconnected step in your workflow, this integration embeds Docusign's core capabilities directly into the Atamis interface.

By creating a unified environment, teams can manage the entire lifecycle of an agreement—from generation and routing to final execution—without ever leaving their primary workspace.

For organisations relying on Atamis to manage procurement, spend, or contracts, speed and data integrity are paramount. Docusign for Atamis is useful because it:

-  **Centralises Operations:** It eliminates the need to toggle between different browser tabs or applications. Your "source of truth" remains Atamis.
-  **Ensures Data Accuracy:** Using data directly from Atamis (like signatory names and email addresses) avoids manual re-keying and inaccuracies.
-  **Provides Real-Time Visibility:** Users can track the status of an envelope (Sent, Viewed, Signed) directly from the Atamis record, ensuring procurement and legal teams are always in sync.

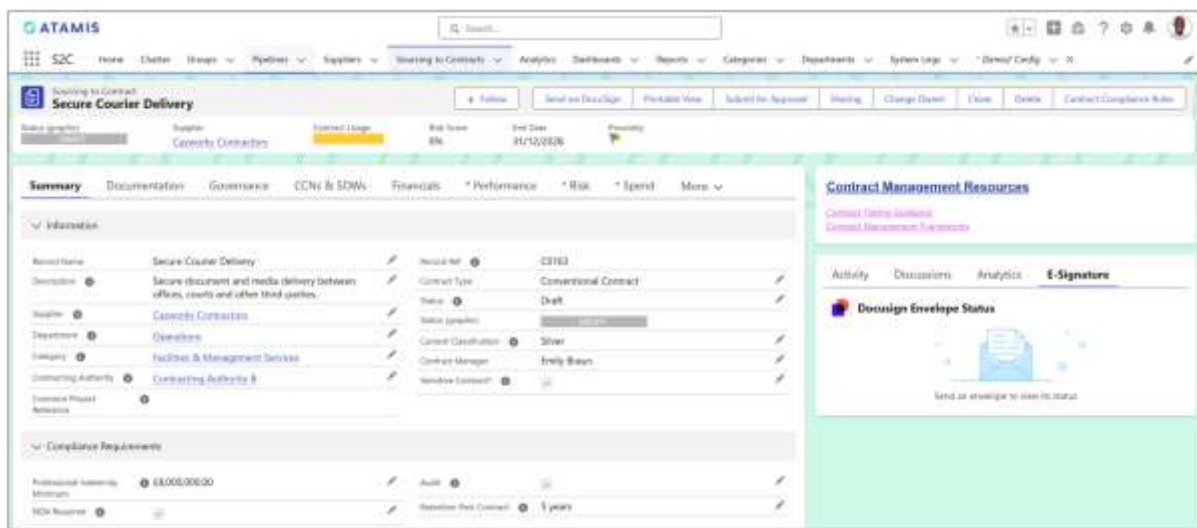
Docusign for Atamis transforms a multi-step manual process into a streamlined, automated workflow

-  **One-Click Sending:** Users can initiate a signature request using the "Send with Docusign" button located directly on an Atamis record.
-  **Pre-Configured Templates:** Users can set up "Envelope Templates" that automatically know which documents to include and which recipients (from your Atamis contacts) need to sign.
-  **Automated Routing:** Documents are automatically routed to the correct parties in the specified order, with automated reminders to keep the process moving.

-  **Mobile Accessibility:** Signers can execute documents on any device, which drastically reduces the turnaround time for urgent agreements.

How Docusign for Atamis works

Following contract award, a draft contract is created within the Atamis Contract Register. From here, the draft document can be circulated for internal reviews and submitted into any necessary approval workflows.



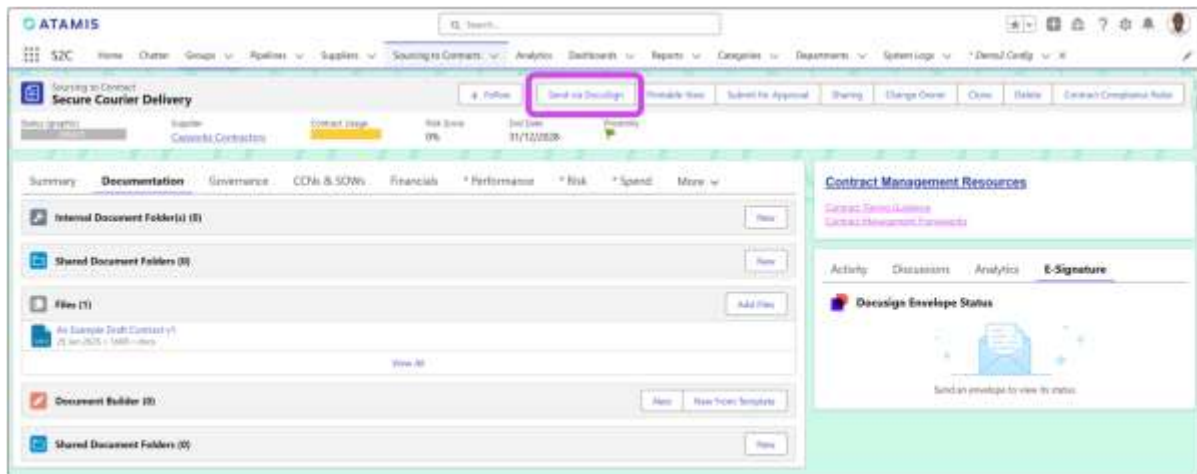
New contract records created in Atamis will undergo the normal review and approval cycles.

Contracts and associated documents are loaded into Atamis and stored against the contract record. Atamis includes Document Management capability that allows the managing of versions, permissions, metadata and sharing.



Drafts of the contract and associated documentation can be uploaded and reviewed within the solution, before a final version is agreed.

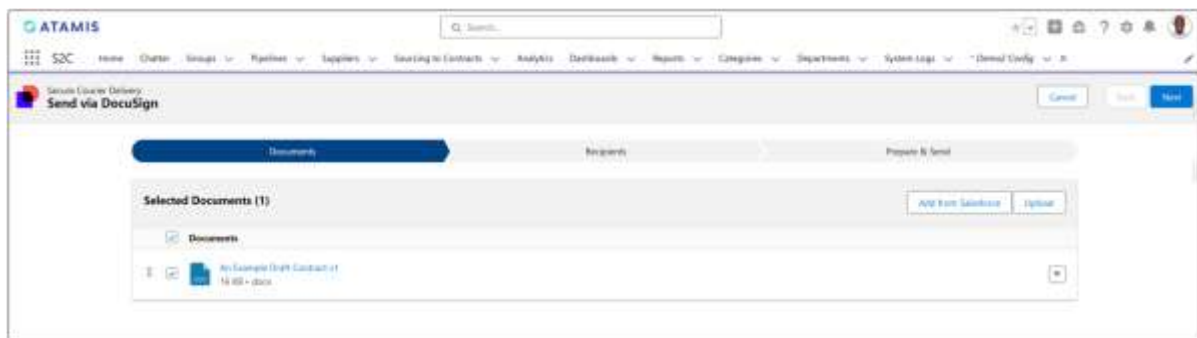
When ready, users can send the document for review and signature(s) via DocuSign.



Drafts of the contract and associated documentation can be uploaded and reviewed, before a final version is agreed.

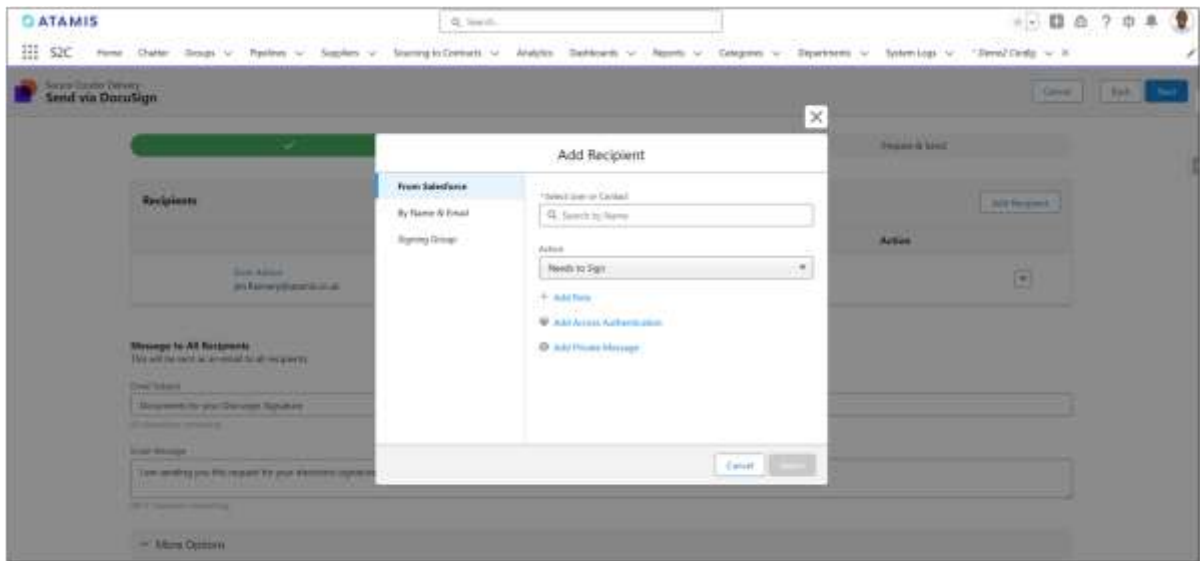
This process can be used for contract documents, NDAs, contract changes and amendments and any other Procurement or Commercial documentation that requires signature and auditing.

The DocuSign component can be used for any document signatures necessary as part of a workflow within Atamis. For example, Supplier Onboarding and Relationship Management, NDAs used for tender participation, Contracting Awarding, Extensions, Renewals etc.



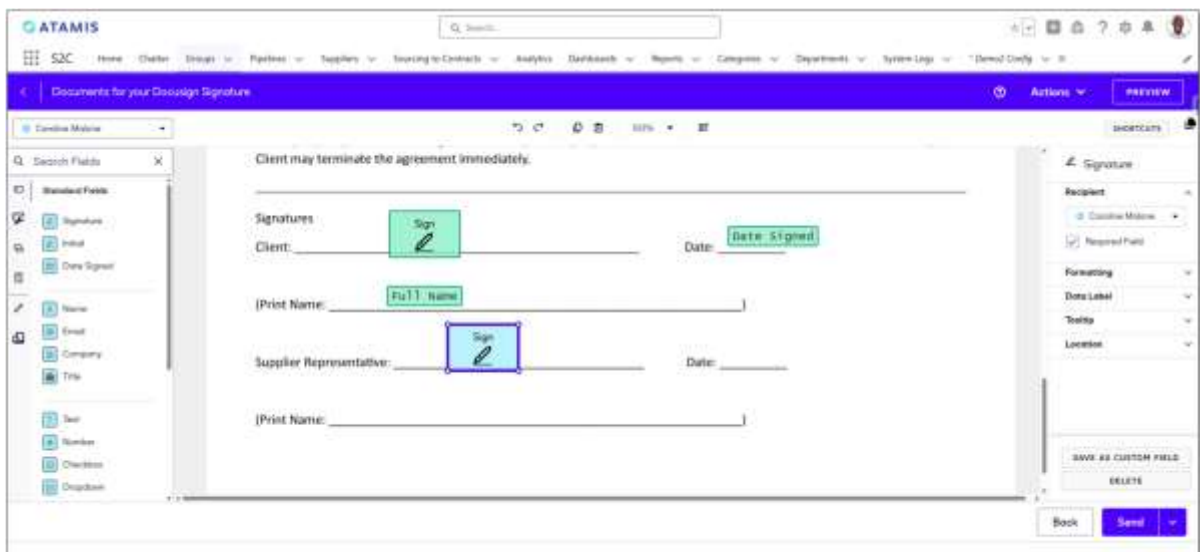
The DocuSign process is embedded within the Atamis solution, and forms part of the contracting workflow.

Documents uploaded to the contract record will be included by default into the DocuSign envelope. Users can add and remove documents as required and also upload additional documents to into the envelope.



Signatories are defined as a step in the workflow and can include both users and non Atamis users as part of the signature chain.

As part of preparing the DocuSign envelope, users will create the list of signatories, their contact details and their order and role in the signing process.



Placeholders can be defined on a per-document basis or created as part of a template for greater efficiency and consistency.

Simple drag-and-drop functionality allows users to position placeholders for each signatory precisely where they need them within the document. When ready, the envelope is sent to signatories.

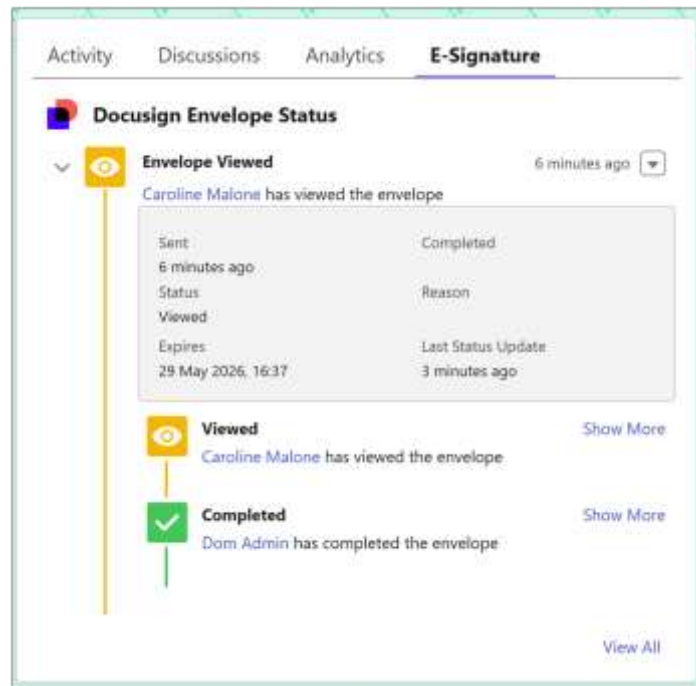
Once sent, the solution will automatically track the status of the DocuSign envelope within the contract record.

The solution provides live status tracking of the signature process, showing which signatories have opened the envelope and which have signed and completed their documents.

Reminders can be issued from here if necessary, to any users that have yet to sign or open their envelopes.

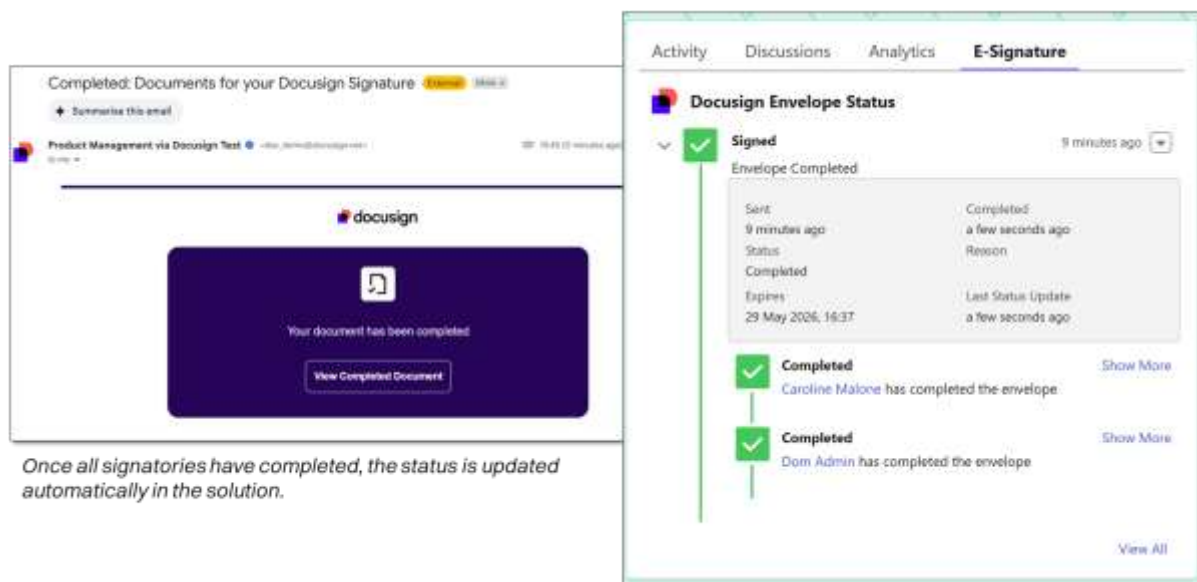
Signatories will receive an email with instructions and a button, taking them straight to their document.

Signatories will receive an email in their inbox, instructing them how to access and sign their documents. Document viewers can also be included in this process, allowing them to keep track of progress.



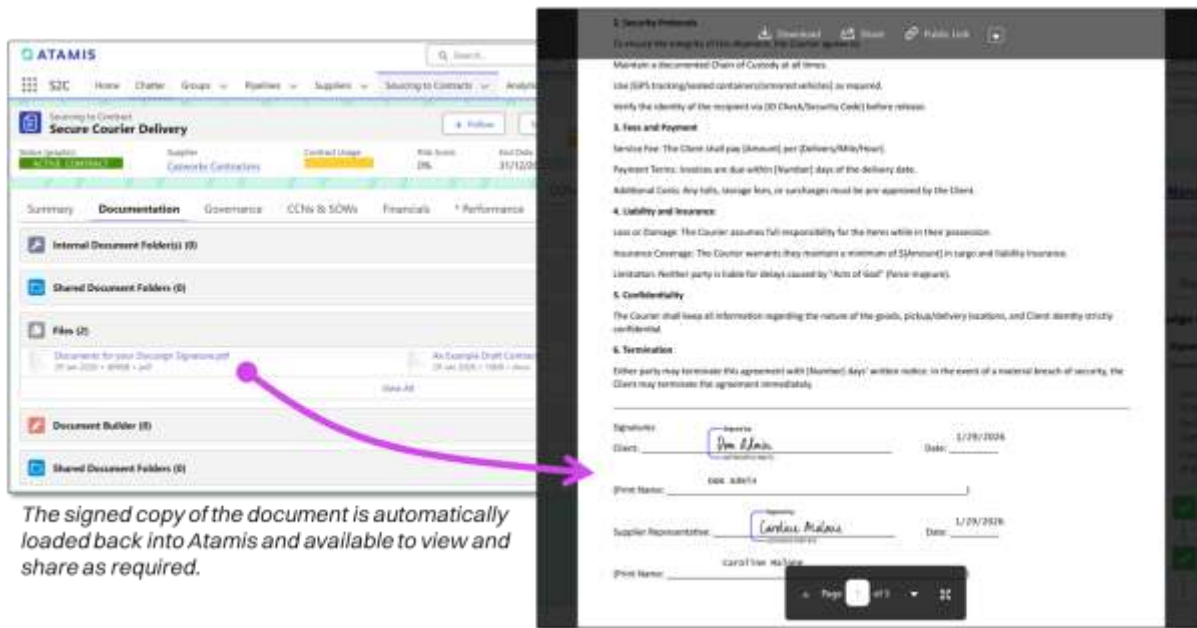
Signature workflows are displayed and updated live in the solution

As signatories complete their signing steps, the status updates will be reflected back in Atamis. This information is reportable, allowing Procurement and Commercial teams to easily keep track of Docusign envelopes and follow up any that appear to be stuck.



Once all signatories have completed, the status is updated automatically in the solution.

Once all signing is completed, signatories and the authors will be notified and the envelope status will be updated in Atamis.



A final copy of the signed document(s) is loaded back into Atamis against the contract record and available for previewing and downloading from Atamis. The finished document can be attributed with additional metadata, such as retention periods, sensitivity tagging etc, and can be searched for or shared with other stakeholders as required.

Supporting Services

Implementation and Professional Services

A comprehensive Client Briefing Pack is provided to all new clients containing a step-by-step guide of all data requirements and resource actions required for the implementation of Atamis.

Atamis solutions are highly flexibility, as such, the initial parts of the implementation focus on workshops for each app/process to facilitate the gathering of specific requirements. This allows the Implementation team to recommend best-practice within Atamis to achieve those outcomes, as well as identifying areas that may need adjusting (as part of the implementation) or configuring (as part of Change Management).

All new clients are assigned a project manager who will oversee the implementation and provide regular updates along with related documentation including a Project Initiation Document, Project Plan and Roles and Responsibilities (RASCI) document.

This approach aims to orient you to our out-of-the-box solution first and foremost and then run a number of client workshops to understand where you may need to adjust the solution to fit specific requirements. Once agreed, Configuration Specialists will proceed with the build & UAT will be performed to ensure all aspects are approved.

Initial build, configuration and testing is typically done in the environment that will become the Production environment. Following sign-off, a copy of the Production environment is made for the Sandbox environment. This is where any further testing and training is usually carried out, when in Business as Usual.

Client Responsibilities

Client involvement is a necessity in the implementation of Atamis, however the level of involvement and timespan of a project will be impacted by the level of configuration or alterations from the standard 'out-of-the-box' solution.

Clients will be required to:

-  Actively take part in scheduled training & configuration workshops. We recommend having key stakeholders available for all planning stages to ensure all requirements are scoped appropriately.
-  Provide configuration details to allow Atamis to generate templates.
-  Perform testing and validate system configuration.

Training

Training is provided as part of the implementation and onboarding process. Usually the training involves an initial walkthrough of the 'out-of-the-box' solution, to help stakeholders familiarise with the solution and set the stage for workshop discussions around additional configurations that may be required. Apps tend to be implemented in series, each with their own dedicated training programme scheduled as part of the delivery plan. These training programmes will be tailored to the final build configuration of the client system.

The delivery of training programmes will be agreed with the project manager at the outset of the project. Atamis offer both remote and on-site training options and provide a user guides for ongoing reference.

Change Management

Following client transition from Implementation into Business as Usual, any additional requirements or re-configurations will be handled through the dedicated Change Management process. This helps to ensure that requests for amendments to client systems are captured, scoped, implemented and tested fully, in partnership with client representatives.

Capture - Change requests are typically discussed with the Client Success Manager, who will be able to gather information and advise on some of the best approaches to achieving the desired outcomes. When ready to be submitted, either clients or Client Success Managers can raise the Change Request via the Support Helpdesk. This ensures that requests are being captured, reviewed and assigned in a structured and timely manner, and can be tracked by clients through the same Support portal as their other tickets.

Scoping - Regardless of the scale of the change, it is crucial to fully understand the requirements and provide a professional assessment of how the change will be delivered, including any potential impacts on related processes. To achieve this effectively, internal discussions within Atamis are often necessary, along with analysis using Workbench or other DevOps tools. This ensures that the optimal solution is identified and delivered in alignment with the core service offering.

Testing - All configuration changes to client systems must undergo internal testing before being released for client acceptance testing and approval. Every change is tested in a sandbox environment before being deployed to the live environment—regardless of whether the client utilises their own sandbox. This rigorous testing process ensures that any potential unintended consequences are identified and mitigated before implementation.

Approval Process - All changes require approvals, these approvals are both internal within Atamis for quality checking purposes and approvals from the Client to ensure

they are content with the build, testing is successful and the move into the Live environment is well considered.

Client Support

As part of the service, Atamis provide support for both clients (buyers) and their suppliers. Atamis Support Desk uses a ticketing system, allowing clients to raise tickets quickly via email or the online portal, and be kept up to date with status updates and dialogue with the support team.

Scope of Service

In Scope

The Atamis Support service covers the following for authorised support contacts:

-  **System Availability:** Ensuring the platform meets the agreed uptime percentage of 99.9%.
-  **System Bug Fixes:** Investigation and resolution of defects within the Atamis system. Support for this is unlimited.
-  **End User Support:** Assistance provided to designated support contacts on topics such as user guidance, forgotten passwords, system errors, and administrative help.
-  **Supplier Support:** Direct support for suppliers on topics like basic how-to questions and end-user assistance.

Out of Scope

The Atamis Support service does not cover the following activities. These may be available as a separate, chargeable service:

-  **Inquiries related to new configurations, feature requests, or ad-hoc data maintenance requests** will be directed to the appropriate department for consideration and may incur additional fees at SFIA day rates.
-  **End-user training and the creation of bespoke training materials.**
-  **Support for issues arising from third-party software, client-side network problems, or integrations not managed by Atamis.**

Roles and Responsibilities

Atamis Support Responsibilities

-  Provide support during the hours specified in the client's support plan.
-  Acknowledge receipt of a new support case to the case owner.
-  Review and assign correct priority level (PL1-PL4) to each case based on the definitions in this document.
-  Use all reasonable efforts to meet the target response and resolution times.
-  Communicate a proposed resolution or provide a statement detailing the steps and estimated timelines to resolve the issue and provide a workaround or action plan where one exists.

Client Responsibilities

-  Appoint designated support contacts who are authorised and trained users of the Atamis system.
-  Ensure all support requests are logged through the official channels outlined in this document.
-  Provide a clear, detailed description of the issue, including any error messages, screenshots, and steps to replicate the problem.
-  Collaborate with the Atamis support team by providing timely responses to requests for additional information.

Off-Boarding

Atamis assures that prior to termination of the contract, regardless of the reasons for termination, it will provide a full data extract.

Atamis includes system reports that end users will be able to run that will extract all data directly. Data can be exported in either Excel or CSV formats. Upon termination of contract, Atamis can provide a final handover of all data held on the system belonging to the Customer back to the customer including original datasets sent, database tables and files used to upload data into Atamis. Data can be provided via any secure format as required.

Following termination of contract, the system will be decommissioned within 1 month. Atamis can, with written agreement of the Customer, delete and destroy all data held

on their systems belonging to the Customer and provide the customer with a written certificate confirming the data, time, place and means by which all data was deleted and destroyed. Termination terms are provided under Atamis standard Terms and Conditions.

Atamis and any related third-party data destruction / deletion practices are fully compliant with UK GDPR requirements and client / authorities' requirements.